

Workflow Reassignment Overview

In Cardinal, all transactions for Purchase Orders, Vouchers, Journals, and Expenses route for approval via workflow, based on business rules. Sometimes these items may need to be moved from one approver to another by the Workflow System Administrator.

There are three scenarios when items need to be moved:

- Approver is out unexpectedly and items need to be moved to another approver
- Approver plans to be out for an extended period of time and items need to be routed during this time
- In rare cases, if no approver is found that meets the business rules for the transaction, they route for reassignment

In cases where items need to be moved, Cardinal provides a **Workflow Reassignment** page. Workflow System Administrators use this page to move transactions as needed. Transactions can be moved to any alternate user that is assigned to the business unit of the transaction and who has approval role(s) for the transaction. All or any selected transactions can be moved at one time.

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Reassigning Transactions

1. Navigate to the **Administer Apprvl Reassignment** page using the following path:
Main Menu > Enterprise Components > Approvals > Approvals > Admin Approval Reassignment

Favorites ▾ Main Menu ▾ > Enterprise Components ▾ > Approvals ▾ > Approvals ▾ > Admin Approval Reassignment

Administer Apprvl Reassignment

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Search by: User ID ▾ begins with UHK37558

☐ Case Sensitive

Limit the number of results to (up to 300): 300

Search Advanced Search

2. Enter the **User ID** for the Approver who has items that need to be moved.
3. Click the **Search** button.

Favorites ▾ Main Menu ▾ > Enterprise Components ▾ > Approvals ▾ > Approvals ▾ > Admin Approval Reassignment

New Window | Help | Personalize Page |

WF Reassignment/Alt Opr Revoke WF Reassignment

Approve ID: UHK37558 Jones, Tom (DOA)
Primary BU: 15100

Select All Deselect All Reassign To:

Pending Transaction Summary

Select	Process ID	Process Name	Business Unit	Transaction Count	Details	Reassign To	Name
<input type="checkbox"/>	ERApproval	Expense Rpt Approval Process	15100		2 Details		
<input type="checkbox"/>	VoucherApproval	Voucher Approvals	15100		1 Details		

Comments

Alternate User

Alternate User ID:

Business Unit

From Date: To Date:

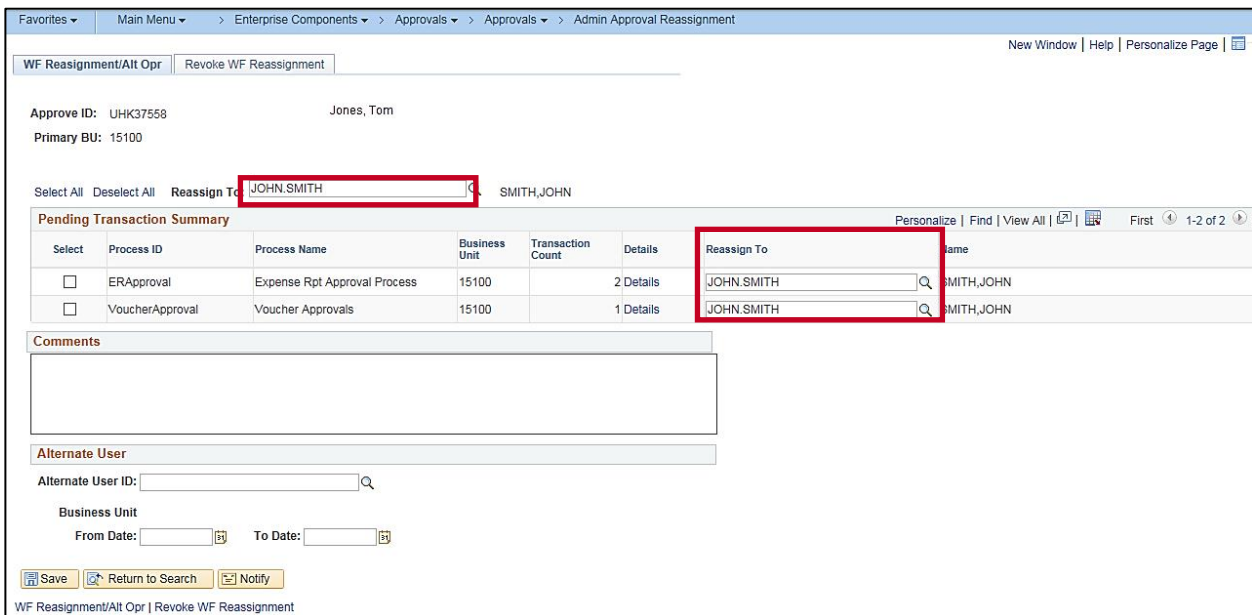
Save Return to Search Notify

WF Reassignment/Alt Opr | Revoke WF Reassignment

4. Two tabs display: **WF Reassignment/Alt Opr** and **Revoke WF Reassignment**.

For this scenario, an item is being reassigned, so the **WF Reassignment/Alt Opr** tab is used. This approver has both pending **Expense** and **Voucher** related items on their Worklist.

This page also contains a section to enter an **Alternate User** for future dated items.



Approve ID: UHK37558 Jones, Tom
 Primary BU: 15100

Select All Deselect All Reassign To: SMITH,JOHN

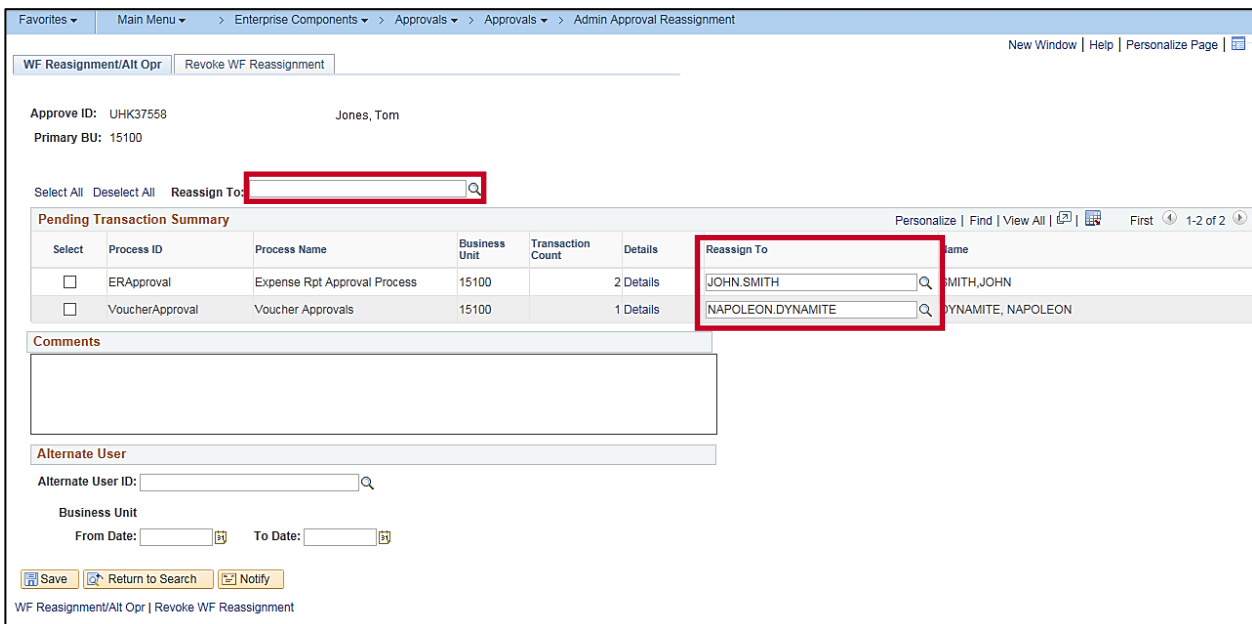
Select	Process ID	Process Name	Business Unit	Transaction Count	Details	Reassign To	Name
<input type="checkbox"/>	ERApproval	Expense Rpt Approval Process	15100		2 Details	<input type="text" value="JOHN.SMITH"/>	SMITH,JOHN
<input type="checkbox"/>	VoucherApproval	Voucher Approvals	15100		1 Details	<input type="text" value="JOHN.SMITH"/>	SMITH,JOHN

Comments:
 Alternate User:
 Alternate User ID:
 Business Unit:
 From Date: To Date:

Save Return to Search Notify

WF Reassignment/Alt Opr | Revoke WF Reassignment

- If all transactions need to be moved to one approver, enter/search for that approver's name in the Header **Reassign To** field. Once the name is entered, it populates in the **Reassign To** field next to each process.



Approve ID: UHK37558 Jones, Tom
 Primary BU: 15100

Select All Deselect All Reassign To:

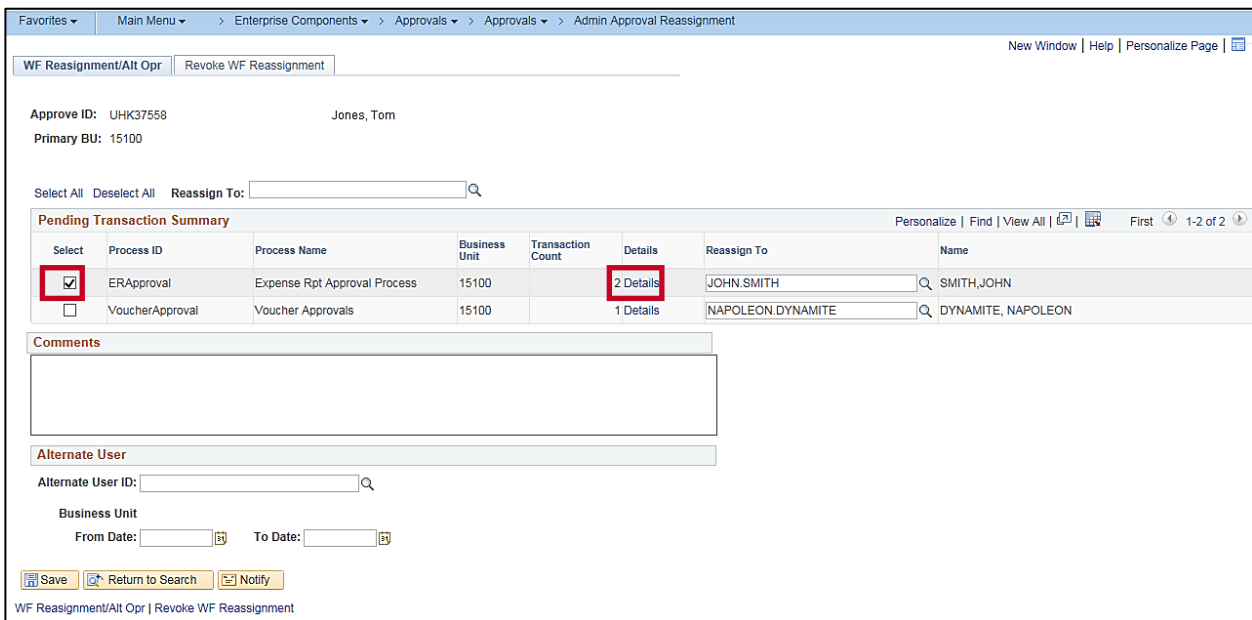
Select	Process ID	Process Name	Business Unit	Transaction Count	Details	Reassign To	Name
<input type="checkbox"/>	ERApproval	Expense Rpt Approval Process	15100		2 Details	<input type="text" value="JOHN.SMITH"/>	SMITH,JOHN
<input type="checkbox"/>	VoucherApproval	Voucher Approvals	15100		1 Details	<input type="text" value="NAPOLEON.DYNAMITE"/>	DYNAMITE, NAPOLEON

Comments:
 Alternate User:
 Alternate User ID:
 Business Unit:
 From Date: To Date:

Save Return to Search Notify

WF Reassignment/Alt Opr | Revoke WF Reassignment

- To assign items to different approver names, leave the **Reassign To** field in the Header blank and enter or select different names for each process in the **Reassign To** field next to that process.



Favorites ▾ Main Menu ▾ > Enterprise Components ▾ > Approvals ▾ > Approvals ▾ > Admin Approval Reassignment

WF Reassignment/Alt Opr Revoke WF Reassignment

Approve ID: UHK37558 Jones, Tom
 Primary BU: 15100

Select All Deselect All Reassign To:

Pending Transaction Summary Personalize | Find | View All | First 1-2 of 2

Select	Process ID	Process Name	Business Unit	Transaction Count	Details	Reassign To	Name
<input checked="" type="checkbox"/>	ERApproval	Expense Rpt Approval Process	15100		2 Details	JOHN.SMITH	SMITH,JOHN
<input type="checkbox"/>	VoucherApproval	Voucher Approvals	15100		1 Details	NAPOLEON.DYNAMITE	DYNAMITE, NAPOLEON

Comments

Alternate User

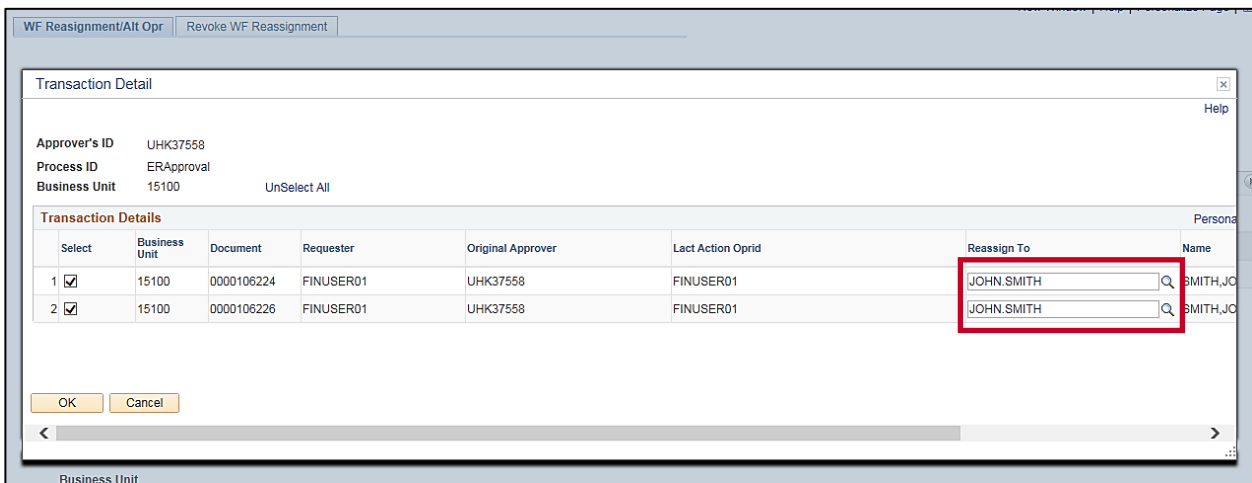
Alternate User ID:

Business Unit
 From Date: To Date:

Save Return to Search Notify

WF Reassignment/Alt Opr | Revoke WF Reassignment

7. Click the **Select** checkbox next to the **Process** to which you want to make changes. For this example, Expense Reports is selected. There are two Expense Reports on this worklist.
8. Click the **Details** hyperlink for the selected process.



WF Reassignment/Alt Opr Revoke WF Reassignment

Transaction Detail

Approver's ID UHK37558
 Process ID ERApproval
 Business Unit 15100 UnSelect All

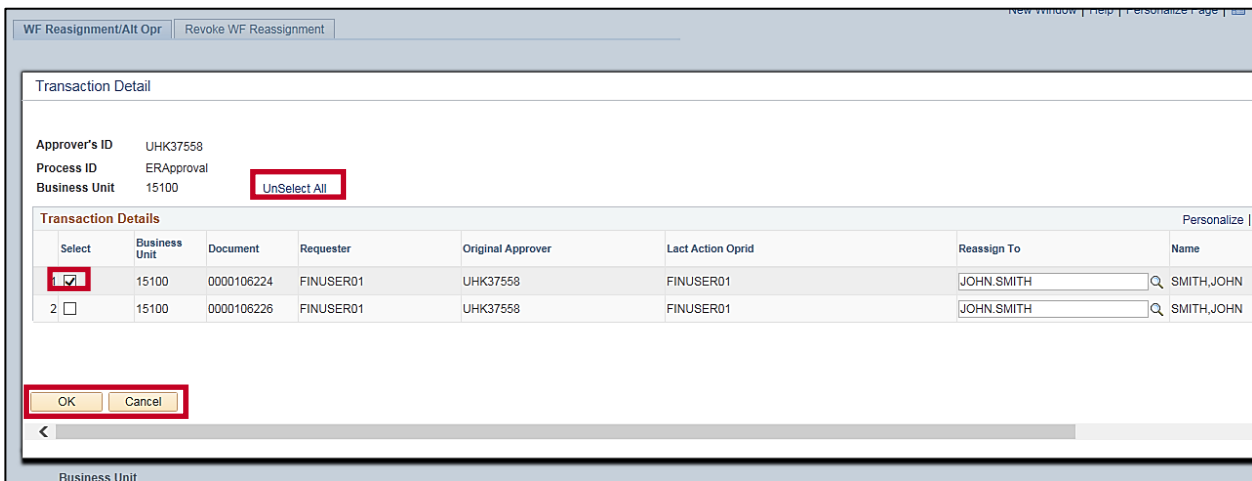
Transaction Details Personalize

Select	Business Unit	Document	Requester	Original Approver	Last Action Oprid	Reassign To	Name
<input checked="" type="checkbox"/>	15100	0000106224	FINUSER01	UHK37558	FINUSER01	JOHN.SMITH	SMITH,JO
<input checked="" type="checkbox"/>	15100	0000106226	FINUSER01	UHK37558	FINUSER01	JOHN.SMITH	SMITH,JO

OK Cancel

Business Unit

9. The **Transaction Detail** pop-up window displays for the selected process. All transactions have been automatically populated with the approver's name entered on the **WF Reassignment/Alt Opr** tab.

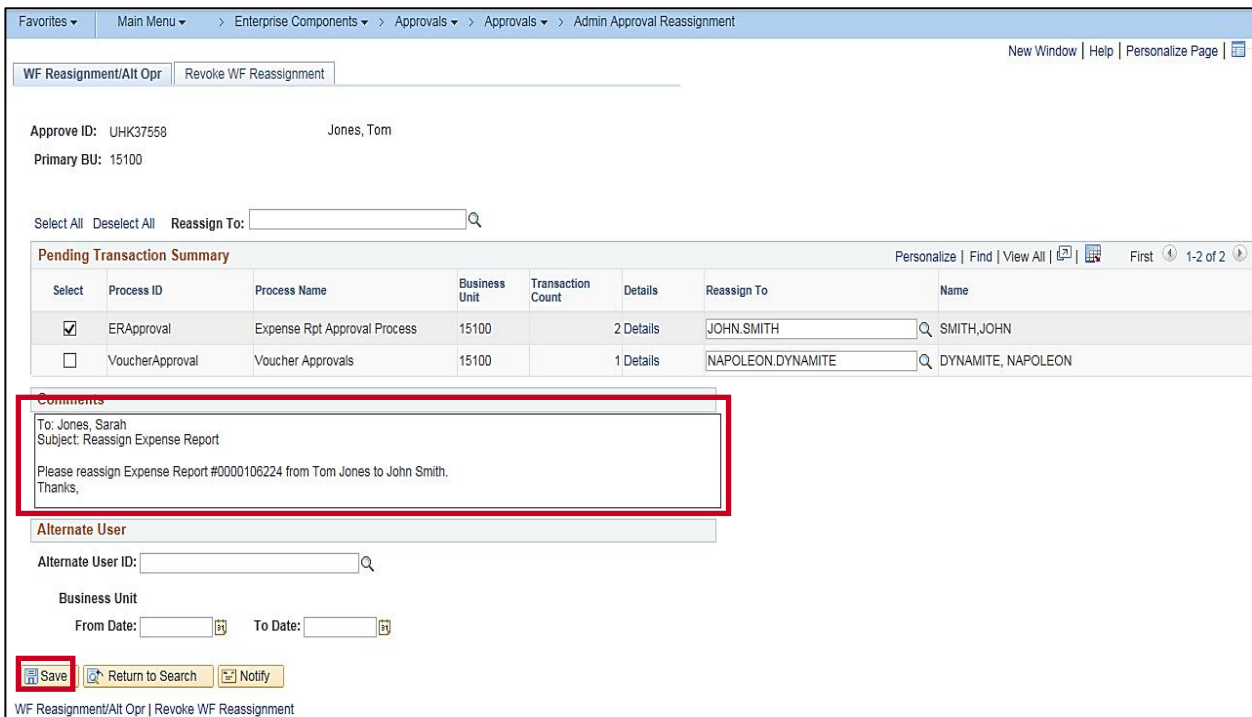


Transaction Detail

Approver's ID: UHK37558
 Process ID: ERAApproval
 Business Unit: 15100 [UnSelect All](#)

Select	Business Unit	Document	Requester	Original Approver	Lact Action Oprid	Reassign To	Name
<input checked="" type="checkbox"/>	15100	0000106224	FINUSER01	UHK37558	FINUSER01	JOHN.SMITH	SMITH,JOHN
<input type="checkbox"/>	15100	0000106226	FINUSER01	UHK37558	FINUSER01	JOHN.SMITH	SMITH,JOHN

10. If you want all transactions to be moved, go to step 13.
11. If you want to select specific transactions to be moved, click the **UnSelect All** hyperlink to uncheck all transactions.
12. Select the transactions that you want to include.
For this scenario, one Expense Report is selected.
13. Click the **OK** button to reassign the selected transaction and return to the **WF Reassignment/Alt Opr** tab.



Approve ID: UHK37558 Jones, Tom
 Primary BU: 15100

Select All Deselect All Reassign To:

Select	Process ID	Process Name	Business Unit	Transaction Count	Details	Reassign To	Name
<input checked="" type="checkbox"/>	ERAApproval	Expense Rpt Approval Process	15100	2	Details	JOHN.SMITH	SMITH,JOHN
<input type="checkbox"/>	VoucherApproval	Voucher Approvals	15100	1	Details	NAPOLEON.DYNAMITE	DYNAMITE, NAPOLEON

Comments

To: Jones, Sarah
 Subject: Reassign Expense Report

Please reassign Expense Report #0000106224 from Tom Jones to John Smith.
 Thanks,

Alternate User

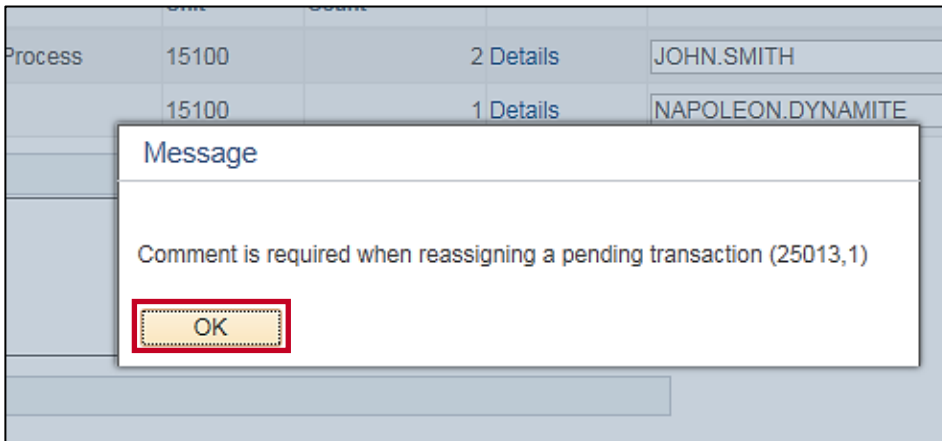
Alternate User ID:

Business Unit

From Date: To Date:

14. Enter any applicable notes in the **Comments** section of the page. Comments are required. Generally, this is copied from the email request received to move the transaction(s).

15. Click the **Save** button.

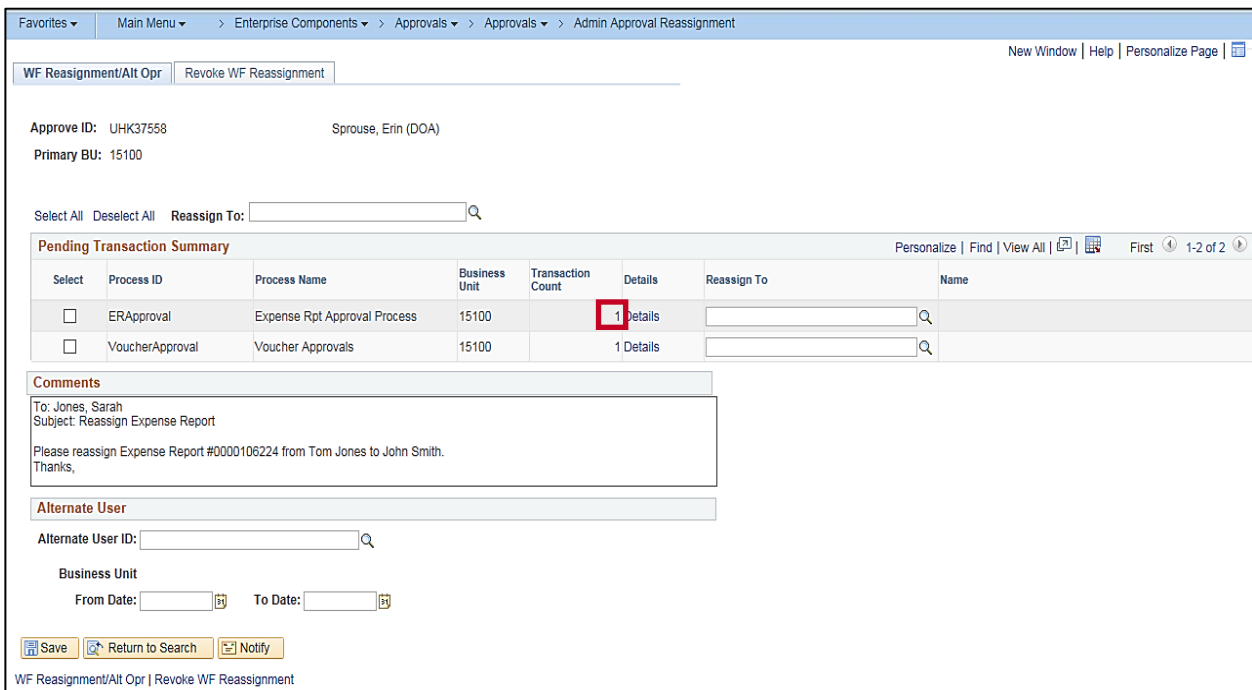


Message

Comment is required when reassigning a pending transaction (25013,1)

OK

16. If a comment is not entered, the above error displays.
17. Click the **OK** button.
18. Enter your comment.
19. Click the **Save** button again.



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[WF Reassignment/Alt Opr](#) | [Revoke WF Reassignment](#)

Approve ID: UHK37558 Sprouse, Erin (DOA)
 Primary BU: 15100

Select All Deselect All Reassign To:

Select	Process ID	Process Name	Business Unit	Transaction Count	Details	Reassign To	Name
<input type="checkbox"/>	ERApproval	Expense Rpt Approval Process	15100	1	Details	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	VoucherApproval	Voucher Approvals	15100	1	Details	<input type="text"/>	<input type="text"/>

Comments
 To: Jones, Sarah
 Subject: Reassign Expense Report
 Please reassign Expense Report #0000106224 from Tom Jones to John Smith.
 Thanks,

Alternate User
 Alternate User ID:
 Business Unit
 From Date: To Date:

[Save](#) | [Return to Search](#) | [Notify](#)

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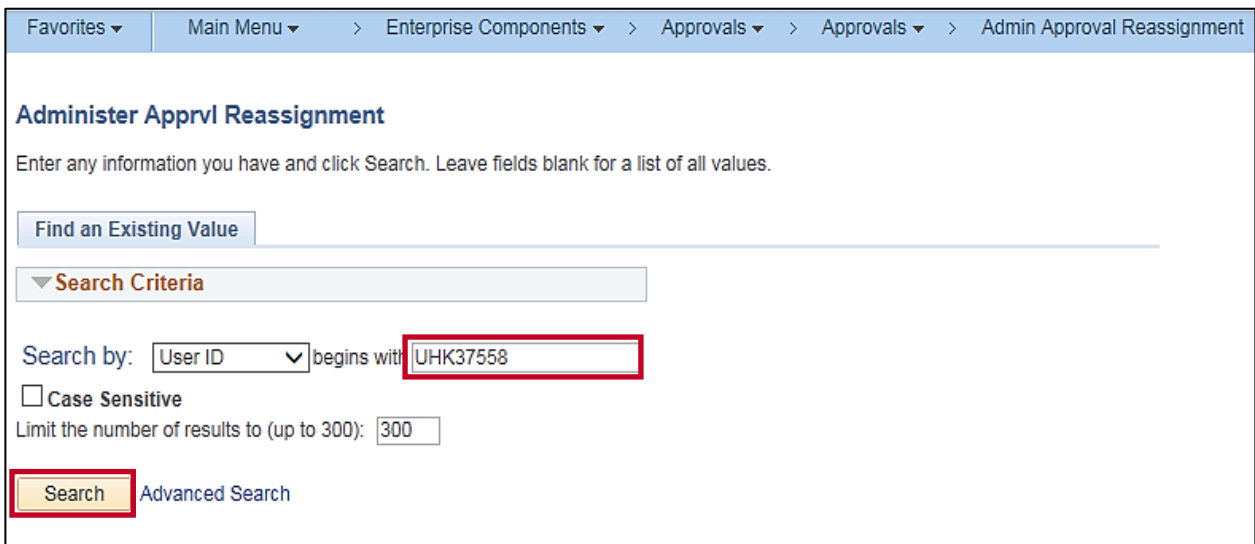
20. The transaction has been successfully reassigned to the selected name.

Note: the **Transaction Count** for Expense Reports has now been reduced from 2 to 1.

Revoking Assigned Transactions

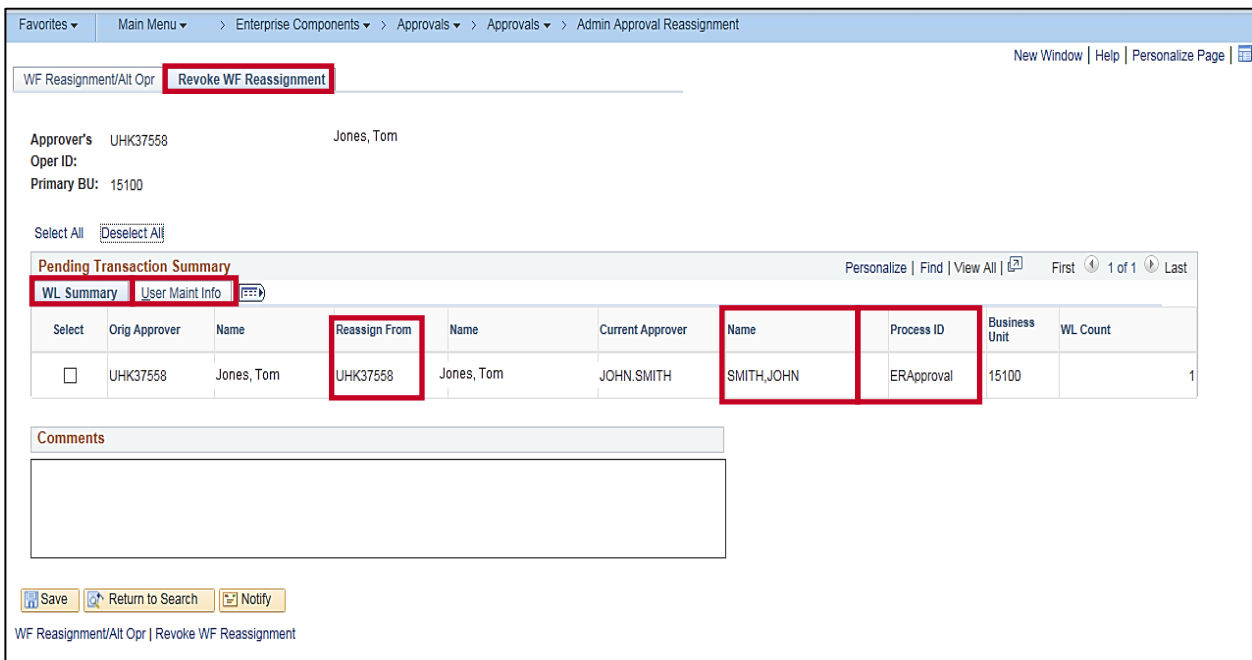
1. To revoke a workflow reassignment, navigate to the **Administer Apprvl Reassignment** page using the following path:

Main Menu > Enterprise Components > Approvals > Approvals > Admin Approval Reassignment



The screenshot shows the 'Administer Apprvl Reassignment' page. At the top is a breadcrumb navigation bar: 'Favorites > Main Menu > Enterprise Components > Approvals > Approvals > Admin Approval Reassignment'. Below this is the page title 'Administer Apprvl Reassignment' and a instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There is a 'Find an Existing Value' button. Below that is a 'Search Criteria' section with a dropdown arrow. Under 'Search by:', there is a dropdown menu set to 'User ID' and a text box containing 'UHK37558'. Below this is a checkbox for 'Case Sensitive'. Further down is a text box for 'Limit the number of results to (up to 300):' with the value '300'. At the bottom are two buttons: 'Search' and 'Advanced Search'.

2. Enter the **User ID** for the Approver who has items that were moved and need to be revoked.
3. Click the **Search** button.



WF Reassignment/Alt Opr **Revoke WF Reassignment**

Approver's UHK37558 Jones, Tom
 Oper ID:
 Primary BU: 15100

Select All Deselect All

Pending Transaction Summary Personalize | Find | View All | First 1 of 1 Last

WL Summary User Maint Info

Select	Orig Approver	Name	Reassign From	Name	Current Approver	Name	Process ID	Business Unit	WL Count
<input type="checkbox"/>	UHK37558	Jones, Tom	UHK37558	Jones, Tom	JOHN.SMITH	SMITH,JOHN	ERApapproval	15100	1

Comments

Save Return to Search Notify

WF Reassignment/Alt Opr | Revoke WF Reassignment

4. Click the **Revoke WF Reassignment** tab.
5. There are two tabs visible under the **Pending Transaction Summary** section: **WL Summary** and **User Maint Info**.
 The default tab is the **WL Summary** tab. It displays a summary of workflow processes that have been reassigned. It shows the name of the approver from whom it was reassigned (**Reassign From**), the **Current Approver** to whom the transaction(s) were reassigned, and the process that was reassigned (**Process ID**).
6. Click the **User Maint Info** tab.

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Approver's: UHK37558 Jones, Tom
 Oper ID:
 Primary BU: 15100

[Select All](#) [Deselect All](#)

Pending Transaction Summary [Personalize](#) | [Find](#) | [View All](#) | [First](#) | [1 of 1](#) | [Last](#)

[WL Summary](#) | [User Maint Info](#) | [\[icon\]](#)

Entered By	Created Dttm
V_COVA_WF_WL_REASSIGN	02/21/2017 2:26:24.000000PM


Comments

[Save](#) | [Return to Search](#) | [Notify](#)

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7. This tab allows you to view previous transaction reassignment data. It includes the User ID of the person that entered the reassignment and the date and time it was created.
8. Click the **WL Summary** tab.


Favorites ▾ Main Menu ▾ > Enterprise Components ▾ > Approvals ▾ > Approvals ▾ > Admin Approval Reassignment


New Window | Help | Personalize Page | 

WF Reassignment/Alt Opr | **Revoke WF Reassignment**

Approver's UHK37558 Jones, Tom
 Oper ID:
 Primary BU: 15100

Select All | Deselect All



Pending Transaction Summary Personalize | Find | View All |  First 1 of 1 Last

WL Summary | User Maint Info | 

Select	Orig Approver	Name	Reassign From	Name	Current Approver	Name	Process ID	Business Unit	WL Count
<input checked="" type="checkbox"/>	UHK37558	Jones, Tom	UHK37558	Jones, Tom	JOHN.SMITH	SMITH,JOHN	ERApproval	15100	1

Comments


Revoked per email request from Tom Jones 2/21/2017

Save |  Return to Search |  Notify

WF Reassignment/Alt Opr | Revoke WF Reassignment

9. Click the **Select** box next to the **Process** to be revoked.
If you want to revoke all processes, click the **Select All** link.
10. Enter an appropriate **Comment**.
11. Click the **Save** button.


Favorites ▾ Main Menu ▾ > Enterprise Components ▾ > Approvals ▾ > Approvals ▾ > Admin Approval Reassignment


New Window | Help | Personalize Page | 

WF Reassignment/Alt Opr | Revoke WF Reassignment

Approver's UHK37558 Jones, Tom
 Oper ID:
 Primary BU: 15100

Select All | Deselect All



Pending Transaction Summary Personalize | Find | View All |  First 1 of 1 Last

WL Summary | User Maint Info | 

Select	Orig Approver	Name	Reassign From	Name	Current Approver	Name	Process ID	Business Unit	WL Count
<input type="checkbox"/>									

Comments

Revoked per email request from Tom Jones 2/21/2017

Save |  Return to Search |  Notify

WF Reassignment/Alt Opr | Revoke WF Reassignment

12. The selected process(es) are removed from the list. Click the **WF Reassignment/Alt Opr** tab.

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Approve ID: UHK37558 Jones, Tom
 Primary BU: 15100

Select All Deselect All Reassign To:

Pending Transaction Summary							Personalize	Find	View All			First	1-2 of 2	
Select	Process ID	Process Name	Business Unit	Transaction Count	Details	Reassign To	Name							
<input type="checkbox"/>	ERApproval	Expense Rpt Approval Process	15100	2	Details	<input type="text"/>								
<input type="checkbox"/>	VoucherApproval	Voucher Approvals	15100	1	Details	<input type="text"/>								

13. The transaction is successfully revoked.

Note: the **Transaction Count** for Expense Reports has increased by 1, from 1 to 2.